# Table of Contents

1. *Introduction* ........................................................................................................................................... 3  
   1.1. Definition ............................................................................................................................................. 3  
   1.2. Disclaimer .......................................................................................................................................... 3  
   1.3. Using EU Login authentication ........................................................................................................... 3  

2. *Roles of users in AGM* .............................................................................................................................. 4  
   2.1. Correspondent ..................................................................................................................................... 4  
       2.1.1. Become a correspondent ............................................................................................................. 4  
       2.1.2. Prepare and send the participants list ....................................................................................... 6  
       2.1.3. Edit the list of participants ........................................................................................................ 11  
   2.2. Participant .......................................................................................................................................... 13  
       2.2.1. Log in as a participant ................................................................................................................. 14  
       2.2.2. Enter payment details ................................................................................................................. 17  
           2.2.2.1. Add new BA for Governmental Experts ................................................................................. 21  
           2.2.2.2. Add new BA for Private Experts ......................................................................................... 25  
       2.2.3. Modifying bank account details .................................................................................................. 26  
       2.2.4. Link a bank account ................................................................................................................... 28  
       2.2.5. Complete and submit expenses claim ....................................................................................... 29  
       2.2.6. Modify expenses claim ............................................................................................................... 36  

2.3. *Notifications* ....................................................................................................................................... 38  
   2.3.1. Notifications sent to a correspondent .............................................................................................. 38  
   2.3.2. Notifications sent to a participant .................................................................................................. 39
1. INTRODUCTION

1.1. Definition

The AGM (A new Gateway to EU Meetings) website makes it easier to organise expert meetings at the Commission and reimburse expenses. The website is currently being tested on a limited number of expert groups and committees. If it’s successful, AGM will be used for all expert groups.

AGM allows experts to:

- receive meeting invitations (including the meeting agenda and other info)
- confirm their attendance
- enter their bank account details
- Create and send their expenses claim electronically.

1.2. Disclaimer

The information contained in this manual is for guidance only and is a description of how to use the AGM application. There are no guarantees as to the accuracy of the descriptions owing to the evolving nature of the system. In no way should this information be considered as replacing EU law or be viewed as the Commission’s legal interpretation.

1.3. Using EU Login authentication

AGM uses the EU login as unique authentication method.

Check our FAQs on the AGM portal to see how to create your EU login account and how to reset your EU login password.
2. Roles of users in AGM

2.1. Correspondent

As a correspondent you are the contact point for the member of the committee or expert group invited to a meeting. You will use AGM to tell the Commission the names of the participants in your delegation (people from your organisation who will attend the meeting).

You can draw up the list of participants outside AGM. When it’s ready, you can enter it in the system.

You will receive an email containing the invitation, the agenda and other information about the meeting from the meeting organiser.

In the email, you’ll also find a link to AGM that will grant you access as correspondent for the delegation.

Be careful who you share this link with – it grants anybody access as correspondent.

Using AGM, you need to enter each participant’s details.

Once the list is finished, you should send it to the meeting organiser.

2.1.1. Become a correspondent

As mentioned above, you will receive an email containing the invitation and other info about the meeting and a link to AGM.

You can see below an example of an invitation sent to a correspondent. The email has two main parts:

1) The invitation with attachments;

2) Instructions on how to become a correspondent, and other links for more information.

You’ll receive the invitation as an attachment, and you’ll also be able to read the wording of the invitation in the body of the email.
By clicking on this link you will become a correspondent for this meeting. You will use your ECAS account to log in to AGM and the meeting details will be displayed. You can then enter the list of participants.
All the links in the disclaimer text take you to the AGM website. There you’ll find more information about AGM (FAQs, support contacts, etc.).

Click on the link in the email to become a **correspondent** for the meeting and to draw up the list of participants in AGM.

2.1.2. **Prepare and send the participants list**

As **correspondent** for a meeting, you need to send the **list of participants** in your delegation to the meeting organiser.

After you click on the link to become a correspondent, the following screen will appear:

Here you can again see the **invitation text** and can access related documents. Use the ‘Navigation Menu’ to access different menus in AGM. Click on ‘Participants’ on the navigation menu. Here you’ll see your name as correspondent. If you see more than one name, it means that the invitation has been sent (or forwarded) to other recipients who have accepted the correspondent role.
Please note: only one correspondent can send the participants list – the first one to react.

Under the heading ‘Delegation Participants’ you have the option to send an empty list or add participants.

After you add the participants, they will appear in the delegation participants section.

The correspondent can add himself as participant clicking on ‘Add as participant’ and filling the mandatory information’s, to complete click on update:

To add more participants select ‘as a new participant of this member’ to invite a participant who never participated in a meeting using AGM, otherwise you can search by name the participant selecting ‘from the last X meetings’.

For a representation level as public authority, the country, other public body, EU body or international organisation is already filled by the meeting organisers, the correspondent can’t modify it. If you represent a country, a region or a province, on the ”Public administration name” field please enter the name of the organisational entity (ministry, department, etc.), if you represent an
organisation, please enter the name of organisation (an intergovernmental organisation, EU institution or body):

For a member with private authority as representation level, the correspondent can choose for every participant the detailed representation.

By selecting the representation level in their individual capacity and representing the interest of an organisation, the correspondent needs to select the Country:

By selecting representing a common interest of several countries the correspondent needs to choose the scope the organisation is representing:
To add more participants select ‘as a new participant of this member’ to invite a participant who never participated in a meeting using AGM, otherwise you can search by name the participant selecting ‘from the last X meetings’.

The following screen will appear. Enter the details of the participants. Complete all the fields.

Please note: the option ‘Entitled to claim expenses’ only applies to some participants. Check the rules in the invitation to see how many participants can claim expenses. Then click ‘Add’.

The participant will appear in the section ‘Delegation Participants’. You can now add another participant if you want.
After adding a participant, you’ll see the label ‘New’ next to the participant’s name, meaning that this participant is new to the list.

In the column ‘Attendance’ you see a question mark (‘?’) (The correspondent adding himself can already confirm the attendance). Although you may know this information as a correspondent, the participant will confirm it in AGM.

To edit a participant’s details or remove them from the list, click the ‘Action’ button next to the participant.

When your list of participants is ready, click the ‘Send Participants’ button to send the list to the meeting organiser.

The following message appears – click ‘Accept’ to send the list.

After you send the list, you cannot edit it in this screen anymore.

You will receive a confirmation message telling you the participants list has been sent to the meeting organiser. The same message appears in the notification menu in AGM.

At the same time, every participant on your list will receive an email telling them their name has been put forward to participate in a meeting.
2.1.3. **Edit the list of participants**

The list of participants has been sent to the meeting organiser for validation. You must now wait for news from the meeting organiser.

The meeting organiser may decide to **validate the list** without any remarks, or can ask you to **make changes**. Either way, you’ll receive an email and a separate notification in AGM.

If the meeting organiser asks you to edit the list of participants, you’ll receive this email:

To edit the list of participants, go to AGM and open the meeting. Open the ‘Participants’ menu, this screen will now appear in editable mode.

Choose the participant you want to remove and click on the ‘**Actions**’ button next to the participant.
Select ‘Remove’ to remove the participant from the list.

If you spot that the details of a participant are incorrect, you can edit them by clicking on the ‘Actions’ button next to the participant’s name. Then select ‘Edit’.
Click on ‘**Update**’ to save the changes.

When you’ve made all the required changes, send the list of participants to the meeting organiser for validation.

You will receive another **confirmation message** by email and a separate notification in AGM telling you the list has been sent to the meeting assistant for validation.

At the same time, the **removed participant will receive an email** stating that he has been removed from the list.

### 2.2. Participant

A participant is an expert who attends a meeting. A participant can be **part of a delegation** (usually nominated by a correspondent) or **attend on individual basis** (directly invited by the organiser).

The participant will receive an email suggesting they attend a meeting, with a link to AGM.

As a participant, you can access the invitation in AGM and check other information about the meeting.

First, you receive an email suggesting you participate in a meeting.

This email includes a link to **activate your user profile** for that meeting.

Use the link in this email to accept or decline the invitation, and submit your personal details to obtain an e-pass access to enter the building.
2.2.1. Log in as a participant

Click on the link with the meeting invitation name and log in using your ECAS account. The first time you open a meeting, you’ll need to link the meeting to your user profile. You’ll have to do this once for each meeting group.
Here you can read the invitation, view any attachments and confirm your attendance. Under the meeting invitation title you’ll see the message ‘You have not confirmed the attendance to this meeting yet.’

Here you need to click on yes to confirm the attendance and if it is a multiple day meeting by default all the days are selected. You can deselect the number of days you will not attend the meeting. If all days are deselected, the attendance changes to no.

Click the dropdown menu in your profile name to enter your personal details.
On this page you’ll find information about your EU login. If necessary, you can change these details by clicking the ‘Change’ button next to each heading.

You need to enter your profile details and identity documents. The meeting organizers need this information to prepare and request your e-pass access to the meeting venue. Once this information is entered, it will be valid and will be stored on your profile. This means that you only need to enter it once and update it only if necessary.

Complete the ‘Profile details’ section and click on ‘Save’.

Complete the ‘Identity documents’ section:
Click on ‘Add new document’ to enter the details of your identity document:
Select the type of document; enter the number, expiry date and the country of issue. Then click ‘Update’ to save this information.

Please remember to update this section when your current document expires. In every meeting invitation you will be asked to enter your profile details. They remain valid in AGM once you have entered them, but we recommend you check that the information you entered is still valid.

Via the edit button next to the document details, you can update or remove the current document.
This page can also be accessed via the link in the invitation.

2.2.2. Enter payment details

When the participants list is validated by the meeting organiser (direct invited delegations are validated as soon the meeting invitation was sent), all participants, including the correspondent, will receive an email and a separate notification in AGM.
If you are not entitled to claim expenses, you do not need to do anything – the email you receive will not mention this procedure.
If you are entitled to have your travel expenses reimbursed, you’ll receive the same notification with a message telling you to enter your bank account details in AGM.

Log in to AGM using your EU login account to view the meetings list:
The ‘Meetings’ list shows all upcoming or previous meetings to which the participant has been invited.

For meetings where you are entitled to have your expenses reimbursed, the information will appear in the ‘Expenses Claim’ column.

In the example above, the claim is in ‘Draft’ status and the bank account details have not been entered.

Click on the link ‘Go to expenses claim’ to access the claim form.

(For more info about the expenses claim form, see Complete and submit expenses claim. This section only explains how to enter your bank details.)
Your bank account details are stored in the second tab of the form. Click on the tab ‘Bank account’ or click on the button ‘Enter bank account’ in the Status section.

The ‘Bank Account’ screen appears.
This screen shows the bank accounts you’ve used for different expenses claims.
In the example above, there are no previous bank accounts as this is the first meeting that this participant is attending.

2.2.2.1. Add new BA for Governmental Experts
Click on ‘Add new bank account’ to start entering the bank account details:

The legal entity is loaded from ABAC automatically; this info is related to the country of provenance of the governmental delegation (in this case the delegation was coming from UK).
Select the country under the account details, this option is available because the account can be located in another country as the delegation country. After selecting the country, the IBAN/Account number and Account holder name fields will be available and needs to be filled as mandatory information’s.

There are three exceptions related to:
The expert representing a Member State can use those accounts (if the IBAN and the account number is not available and they only have the treasury account reference number) by selecting the link "Treasury account" and then entering as account number a specific code that is provided by the European Commission. To receive the specific code contact ec-agm-support@ec.europa.eu indicating your email, your ministry and country and the account you'd like to use (if you have a previous expert reimbursement sheet please attach it).

The **IBAN** field let enter only the **correct number of letters and numbers** for each country.

Click on the ‘verify’ button after filling in all the required fields under the account details.

If the Bank account exists in ABAC, (after selecting confirm on the warning message if you want to use this new added account) the bank account can be submitted:

If the Bank Account is new in ABAC, a new window will open where the expert needs to fill, as mandatory information’s, the Account Holder and Bank Branch sections. If you selected the option to certify that you are the account holder, it is mandatory to add a recent bank statement:
If you select the option that you are not the account holder, after saving the information’s and confirming the Bank Account Creation, you need to print the financial identification form, asking the account holder to sign it and upload the scanned version. The recent bank statement is not mandatory in this case, but if it is missing the financial identification form needs to be stamped and signed as well from the Banks representative:

Upload the signed form and save it, after confirming the update, the signed form will be available in account details and you can select the BA and submit it for validation:
After the Bank Account was submitted for validation, the expert will be informed by email if a correction of the bank account details or another bank account is required:
2.2.2.2. Add new BA for Private Experts

Click on ‘Add new bank account’ to start entering your bank account details:

The **IBAN** field let you enter only the **correct number of letters and numbers** for each country.

If you enter an incorrect IBAN or account number, the financial department of the European Commission will tell you after verification.

All the fields are mandatory except the ‘**VAT number**’.

Click on the **Verify** button after filling in all the required fields.
In the next screen, you’ll be asked if you want to use this bank account for your expenses claim:

![Confirm Bank Details Creation](image)

Click on ‘Ok’, and on the next screen confirm the use of this bank account for this expense claim:

![Confirm Bank Details Creation](image)

2.2.3. **Modifying bank account details**

During the bank account validation process, the financial department may ask you to modify your bank account details or enter a new bank account. In this case, you’ll receive an email and a notification in AGM.
In the example below, the financial department is asking the participant to update the account holder name from personal name to company. Here you can see that the expert accidentally entered her own name instead of the company name when entering her bank account details.

Click on the link in the email to log in to AGM using your ECAS account details. This will take you to the bank account details screen.

Click the ‘Edit’ icon and the following screen appears:
The screen is displayed in editable mode. Any data you entered previously is still there. Just make the necessary changes and click 'Verify'.

2.2.4. **Link a bank account**

A bank account that has been validated and used for a meeting belonging to one meeting group can be used for reimbursement for another meeting in the same group, without being validated again. But if you want to use this bank account for a *meeting that belongs to another meeting group*, you need to link it to the new meeting group.

In the example above the participant has to submit his bank account details to have expenses reimbursed for the meeting *Notification* that belongs to meeting group *New wave*. Under *Available bank accounts* you can see the bank account used in the meeting group *BUDG – AGM Acceptance*. Click on select this bank account and on the following screen click on *Submit bank details* to link the account to the new meeting group:
2.2.5. **Complete and submit expenses claim**

If you are entitled to claim expenses, you can only submit your claim *after the meeting has been held* and the **meeting organiser** has **confirmed your attendance**.

You will receive an **email** and a **notification** telling you that the meeting organiser has confirmed your attendance.

Click on the link in the email to access AGM and log in using your ECAS account.

Go to the meeting list and click ‘**Go to expenses claim**’. This will be in ‘**Draft**’ status next to the meeting for which your attendance has been confirmed.

If you don’t start the reimbursement process after this email, you will receive a reminder 10 and 20 days after the meeting assistant closes the meeting. Remember, the submission deadline of the expense claim is 30 days, after reaching the 30 days the claim will be considered as foregone (You
have foregone the expense claim or the claim submission deadline has been reached) and cannot be submitted anymore.

If you haven’t yet entered your bank account details, you’ll see the message ‘please enter bank account details’ next to the expenses claim. You can see how to edit your bank account details here.

The expenses claim form has 3 main sections:

Travel details
Expenses
Status

In the top right-hand corner, the attended sessions appear, as confirmed by the meeting organiser.
On the bottom of the expense claim you have an option "x I will not claim expenses":

By using this option you can indicate that you don't want to claim the expense, preventing any notification still related to this expense claim. You will be prompted to enter a justification message about the reason you don't want to be reimbursed and the expense claim status will change in "Foregone":

Under 'Travel Details' click on edit (on the bottom of the section) to enter the details of your journey by completing the following fields:
Place of work
Country
Departure details
Arrival Details
Expert's comments (here you can add comments to explain any issues).
Click ‘Save’ to save the information.

Under ‘Expenses’, you can add expense types by clicking on the dropdown menu ‘Select expense type’. Then click ‘Add expense’.

The expense types may vary from the list above, depending on the rules of your meeting group.

**Accommodation expense**: Enter the number of nights. Upload supporting documents such as the hotel bill (only non-editable attachments are allowed: PDF, JPG, PNG, TIF, TIFF, BMP and GIF and you should provide at least one supporting document for each expenses claim).
After adding your accommodation expense type, it will appear in the List of Expenses.

**Daily allowance expense**: Enter the number of nights and upload your supporting documents. Click on 'Update' to save.

**Airplane expense**: Enter the price paid and select the currency. If you bought a business class ticket, you should upload supporting documents to show why. Upload your supporting documents and click 'Update' to save.
Expenses list:
All the expense types you’ve entered will appear here.
There is an ‘Edit’ button next to each expense type if you need to make changes.
There is a separate column for each expense type.
Any comments entered by the meeting organiser during the validation process will appear in the ‘Request for Modifications’ column.

Status
This section gives you an overview of the steps you need to complete before you submit your expenses claim.

Steps you have not yet completed appear in red. Steps you’ve completed successfully appear in green.

In the example below, only the first and last steps have been completed. This means the bank account is valid, and attendance has been confirmed by the meeting organiser. But 3 steps still appear in red — the travel details, the expenses and the supporting documents.

The claim remains in ‘Draft’ mode until all steps are complete.
When all steps are complete, they appear in green text and the status changes to ‘Ready to Submit’. The button ‘Submit claim’ is available:

Click on ‘Submit claim’ to submit the expenses claim for validation. The following screen will appear with a ‘Declaration’.

Tick the checkbox to sign the ‘Declaration’ and click ‘Submit reimbursement’. A green message will appear at the top of the screen confirming that your claim has been submitted and the status will change to ‘submitted’.
In the meetings list, the claim also appears as ‘submitted’:

![Meeting List]

2.2.6. **Modify expenses claim**

The expenses claim must go through a validation procedure. *If there is any problem with your claim*, the organiser will ask you to modify it.

You’ll receive an email with a link to the expenses claim:

![Email]

In the example above, the organiser is asking the participant to modify an expenses claim for the meeting ‘All United’. The reason is highlighted in yellow.

Click on the link in the email to access the claim.

The claim is in ‘Ready to submit’ mode.
Click on ‘Go to expenses claim’ and scroll down to the ‘Expenses’ section.

In the column ‘Request for modification’ you’ll see the reason for modification.
Click on the ‘Edit’ button to make the changes:

Click on ‘Select files’ to upload a file.
Click on ‘Update’ to save.
Submit the claim again for validation.

After the organiser validates your expenses claim, the status in the ‘Expenses Claim’ column will change to ‘VALIDATED’:
2.3. Notifications

As a correspondent or participant you will receive several automatic notifications in AGM. Notifications are sent to individuals (actual AGM users).

Along with each notification, you will also receive an email sent to the address you used to create your ECAS account.

The notifications appear in the notifications tab when certain actions are carried out.

List of notifications sent to a correspondent
List of notifications sent to a participant (expert)

2.3.1. Notifications sent to a correspondent

Go to the AGM website, select the ‘Notifications’ tab on the main screen:

Here you can see all notifications sent to you as a correspondent, e.g.:
• confirming that you have sent the list of participants to the meeting organiser,
• reminding you to submit the list of participants even if they are empty,
• telling you that the meeting organiser has asked you to modify the list of participants,
• telling you that the meeting organiser has validated the list of participants.

2.3.2. Notifications sent to a participant

Go to the AGM website, select the ‘Notifications’ tab on the main screen:

Here you’ll see all the notifications sent to you as an expert, e.g.:

• telling you that your name has been put forward to attend a meeting,
• informing that your participation has been validated,
• telling you it’s time to submit your expenses claim (if you are entitled to have your expenses reimbursed) – you’ll receive this when the meeting organiser confirms your participation in the meeting after the meeting has taken place,
• asking you to modify your expenses claim – you’ll receive this if there is any problem with your claim,
• confirming the SWIFT bank transfer has been made.