

# **Workshop Organizer Guidelines**

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## Table of Contents

<b>Workshop Organizer Guidelines</b>	1
<b>1. About</b>	3
<b>2. Funding</b>	3
<b>3. Payment of the grant</b>	4
<b>4. Beware of rising fraud cases</b>	5
<b>5. Travel, childcare and accessibility grants</b>	5
<b>6. Registration fees</b>	7
<b>7. Participants</b>	8
<b>8. Lectures</b>	9
<b>9. Publicizing &amp; co-funding</b>	10
<b>10. Poster and website</b>	11
<b>11. Poster Prize and EMBO Press editor talks</b>	12
<b>12. Code of conduct</b>	12
<b>13. Encouraging Sustainable Meetings</b>	13
<b>14. Participant feedback</b>	14
<b>15. Data protection</b>	14
<b>16. Final documentation</b>	15
<b>17. Registration Fee Collection</b>	16
17.1. Overview of the COMS payment module	17

**EMBC/EMBO Partners:****A****Member States**

Austria, Belgium, Bulgaria, Croatia, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Israel, Italy, Latvia, Lithuania, Luxembourg, Malta, Montenegro, Netherlands, Norway, Poland, Portugal, Slovak Republic, Slovenia, Spain, Sweden, Switzerland, Türkiye, and United Kingdom

**B****Global Partners**

Chile, India, Singapore, Taiwan

**EMBO subject areas**

Cell Cycle, Cell & Tissue Architecture, Cellular Metabolism, Chromatin & Transcription, Development, Differentiation & Death, Evolution & Ecology, Genome Stability & Dynamics, Genomic & Computational Biology, Immunology, Membranes & Transport, Microbiology, Virology & Pathogens, Molecular Medicine, Neuroscience, Plant Biology, Proteins & Biochemistry, RNA, Signal Transduction, Structural Biology & Biophysics, Systems Biology

**Contact:** [courses\\_workshops@embo.org](mailto:courses_workshops@embo.org)

# 1. About

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EMBO Workshops are meetings that cover different and evolving aspects of life science related subject areas and bring scientists together to present and discuss their latest findings. Workshops may alternate with corresponding meetings held outside of Europe, facilitating interactions between scientists based in Europe and beyond.

# 2. Funding

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The maximum funding available for an EMBO Workshop is €42,500 (€35,000 of core funding plus €5,500 exclusively for travel grants and registration fee waivers, €1,000 for childcare grants and €1,000 for accessibility grants). Decisions on the amount of funding are made on a case-by-case basis. Organizers are therefore required to justify all major costs in the budget section of the application form. It is expected that participants (other than the speakers) will pay for their travel, accommodation, and a modest registration fee. Organizers can request **invited speakers to donate their travel support** by paying for their own travel (as many institutes pay for speakers' travel to conferences) or through personal grants. The funds saved can go towards additional travel grants for participants in need of support.

## EMBO funds **do not cover**:

- overheads or purchase of equipment
- *per diem* expenses
- poster prizes
- gifts for speakers and participants
- honoraria
- dinners/meals organized exclusively for speakers

Any items deemed ineligible according to the EMBO funding guidelines will not be funded, regardless of their inclusion in the application.

## EMBO funds can be used to cover:

- travel (economy), accommodation and subsistence costs of the speakers
- catering costs during the meeting
- administrative costs up to €4,000 for in-person meetings and up to €5,000 for virtual meetings
- room hire, Audio-Visual (AV) and IT facilities essential for the workshop
- for social activities (e.g., excursions) up to max €3,000

For hybrid meetings, an additional grant of €3,000 (or up to €5,000 if justified) will be provided at the discretion of the committee. The funds can be used to cover:

- rental of a virtual platform to host the virtual part of the meeting
- rental of additional AV equipment and personnel costs
- additional administration costs.

To reduce environmental impact, organizers are encouraged to consider distributing the abstract book in electronic format via the workshop website and, if necessary, to print only a minimum number of hardcopies.

It is understood that, as an organizer, you do not render any services on behalf of EMBO. The organizing institution is responsible for the EMBO Workshop. It is supported by EMBO with a grant, provided that the meeting is organized as described in the initial application (except for any further modifications that are subsequently approved in writing by EMBO), and that promotion of the meeting and submission of the final documentation complies with the funding conditions.

If you are holding your workshop in hybrid or virtual format, please review [EMBO Virtual and Hybrid Meeting Organizer Guidelines](#) for recommendations on organising a hybrid meeting.

Please inform EMBO as soon as you have decided upon any changes to the original plans, via [courses\\_workshops@embo.org](mailto:courses_workshops@embo.org).

## 3. Payment of the grant

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The funds will be transferred to the account specified by you and to which you have access. **EMBO will not transfer the funds to 3<sup>rd</sup> parties** (these include events management companies that an organizer may hire to manage the meeting on their behalf). We recommend that you open a separate account, preferably at your institute, with the name of the Workshop. Please do NOT use the term EMBO in the naming of the account, since this implies to our auditors that this account is managed by EMBO.

50% of the allocated funding will be transferred to organizers approximately four months prior to the start of the workshop. Before this transfer, EMBO must be notified of any significant changes to the workshop budget and/or scientific programme after it has been initially approved.

Once the final financial statement and reports have been approved by EMBO, the remaining funds (up to 50% of the allocated funding plus the amount spent on travel, childcare and accessibility grants) will be transferred. Please list the travel, childcare and accessibility grants recipients separately in the final report.

Since EMBO offers to set-up a website and registration system, design a poster, and provide meeting bags and pens at no additional charge, any expenses incurred for these services will not be covered by EMBO funding and will be deducted from your final payment with the exception of the COMS payment service.

**The final documentation must be submitted to EMBO within three months following the end date of the workshop. Failure to do so will result in the final payment being forfeited.**

**EMBO reserves the right to claim unspent funds based on the financial statement.**

## 4. Beware of rising fraud cases

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### Organizers:

After a recent fraud case involving an EMBO meeting organizer, organizers are asked to be vigilant when making any financial transactions. Please counter check to ensure that funds transfers involve only bonafide vendors or service providers' bank accounts. Be especially cautious and seek to verify information if funds transfer details are changed suddenly. Please note that EMBO is unfortunately not able to offer any additional funding to compensate for losses through fraud.

### Speakers:

Please note that speakers at EMBO Courses & Workshops have been contacted (via email or phone) by companies who wrongfully claim to be responsible for hotel and/or travel bookings and request credit card information. Please alert your speakers to this and inform them about the procedures you will use for the organization of your meeting.

## 5. Travel, childcare and accessibility grants

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Travel grants can be used to cover travel, accommodation, visa costs and/or registration fees. Organizers should announce the travel grants and registration fee waivers to participants in advance of the workshop, as soon as registration opens.

Organizers receive an additional €7,500 for their meetings to cover the following:

For meetings in EMBC Countries (A, see list on pg3):

Type of grant	Amount allocated	Available for registered participants working in laboratories in	Explanatory notes
Travel grants and registration fee waivers	€2,500	All countries	Applicants should specify their needs in the registration form. Maximally €500 per participant can be allocated.
Childcare grants	€1,000	All countries	To cover additional childcare costs incurred by participants or speakers participating at EMBO-funded meetings (including virtual and hybrid). Eligible costs include fees for childcare, travel costs for a caregiver, or travel costs for taking the child to the meeting etc.

			Applicants should specify their needs in the registration form. Maximally €500 per participant can be allocated.
Special travel grants & registration fee waivers	€3,000	Chile, India, Singapore, and Taiwan	For participants of any nationality working in laboratories in Chile, India, Singapore, and Taiwan. Registration fee waivers and travel grants should cover the cost of attendance for participants who need it. Applicants should specify their needs in the registration form. Maximally €1,000 per participant can be allocated.
Accessibility grants	€1000	All countries	For supporting participants or speakers with any access needs. These grants cover additional costs e.g. to adapt the conference environment, or to be accompanied by someone to assist the participants where necessary. Participants with access needs may apply for a grant via the registration system of the meeting, or by emailing the organizers directly. Maximally €500 per participant can be allocated.

**Please note that the budget allocated to each category is not transferable.**

#### For meetings in Chile, India, Singapore, or Taiwan

Type of grant	Amount allocated	Available for registered participants working in laboratories in	Explanatory notes
Special travel grants and registration fee waivers	€2,500	EMBC members states (A, see list on pg.3)	Applicants should specify their needs in the registration form. Maximally €500 per participant can be allocated.
Childcare grants	€1,000	All countries	To cover additional childcare costs incurred by participants or speakers when participating at any EMBO meeting including virtual and hybrid meetings. Eligible costs include fees for a baby-sitter or child-care facility, travel costs for a caregiver, or travel costs for taking the child to the meeting, etc. Applicants should specify their needs in the registration form. Maximally €500 per participant can be allocated.
Travel grants & registration fee waivers	€3,000	All countries	Applicants should specify their needs in the registration form. Registration fee waivers and travel grants should cover the cost of attendance for participants who need it. Applicants should specify their needs in the registration form. Maximally €750 per participant can be allocated.

Accessibility grants	€1000	All countries	For supporting participants or speakers with any access needs. These grants cover additional costs e.g. to adapt the conference environment, or to be accompanied by someone to assist the participants where necessary. Participants with access needs may apply for a grant via the registration system of the meeting, or by emailing the organizers directly. Maximally €500 per participant can be allocated.
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**Please note that the budgets allocated to each category are non-transferable.**

Organizers may consider awarding fee waivers to applicants from lower income economies.

The EMBO travel grants shall be allocated based on the quality of the abstract submitted.

Please contact the eligible participants to offer them the grant or registration fee waiver and **reimburse the recipients directly for their travel costs**. Participants must provide documentary proof of these expenses to organizers (e.g., receipts, invoices etc.) to be reimbursed. It is the organizer's responsibility to select the awardees and directly reimburse them for their expenses as EMBO does not process reimbursements.

For the childcare grant, applicants must provide documentary proof of these expenses to organizers (e.g., receipts, invoices etc.) to be reimbursed. It is the organizer's responsibility to select the awardees and directly reimburse them for their expenses as EMBO does not process reimbursements.

After your meeting, please provide us with the name, country of residence, and amount awarded to each recipient as part of the final documentation you will send to EMBO. Please keep a copy of all participant travel receipts. **We will reimburse you for the total amount of the travel and childcare grants along with the final payment.**

Note: Recipients of travel, childcare and accessibility grants and registration fee waivers who fail to attend the meeting cannot be reimbursed regardless of the circumstances.

## 6. Registration fees

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Organizers should keep in mind the VAT (Value Added Tax) in the country in which the workshop is taking place when setting the registration fees.

Registration fees:

- Should be charged up to a maximum of €605 per academic participant (excluding accommodation).
- Should be charged up to a maximum of €385 for Postdocs and PhD students (excluding accommodation).

- Should be charged at a minimum of €770 for participants from industry (excluding accommodation).
- Should be paid directly to the organizer (or the organizer's nominee) and included as income in the final financial statement (please note that EMBO does not collect registration fee payments, however, fees can be collected via the website set up by EMBO, see Registration Fee Collection. The income from the registration fees is considered as EMBO funding).
- Must be waived for one EMBO editor registered for the workshop (the editor will cover their own travel and accommodation expenses).
- A discounted fee (i.e. Postdocs and PhD student price) can be offered to one editor from other scientific journals who attends the workshop.
- Please include simple terms and conditions for refunds in case of cancellations. This is to ensure transparency and manage the expectations of those registering for the meeting.
- For virtual participants, refer to the [EMBO Virtual and Hybrid Meeting Organizer Guidelines](#) for recommended registration fees.

## 7. Participants

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When selecting speakers and participants, organizers are requested to ensure a wide geographical representation and gender balance. At least two-thirds of the participants should be based in EMBC Member States (A - see list on page 2), with no more than 25% of participants residing in the country where the workshop is being held. In the case of workshops held outside Europe (B or C - see list on page 2), a greater representation of scientists based in the respective continent/country is encouraged.

Participation should not be restricted to pre-defined participants (whether this is a regional network (e.g. EU Network) or other defined groups).

Participants can provide information regarding any special needs on the registration form. These may include any dietary requirements or accessibility needs. Organizers are requested to please accommodate these needs where possible. Should it not be possible to provide the requested services, please inform the applicants.

It is at the discretion of the organizers to define their own policies on participants using social media (e.g., X, formerly Twitter) or taking photographs or recordings of presentation slides or posters during the meeting. Please inform participants of the policies that you would like to adopt via your meeting website (there is a section on the website made by EMBO) and other communication channels. Also see the [Code of Conduct](#) section below. This text will also be displayed on the website created by EMBO.

You may want to consider organizing a satellite meeting that is open to the local scientific community. You can apply for funding of up to €2,000 to organize this satellite meeting, by contacting us at [courses\\_workshops@embo.org](mailto:courses_workshops@embo.org). The funding can be used to cover:

- extra accommodation nights for speakers who are already participating in the EMBO-funded workshop

- transportation for speakers to the satellite meeting venue
- meals for speakers
- audio-Visual for the meeting

Please note that the programme should indicate that the satellite meeting is supported by EMBO.

For details, please review the [Satellite Meetings Guidelines](#).

## 8. Lectures

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Lecture	Description
<b>EMBO Young Investigator Lectures</b>	<p>The EMBO Young Investigator Programme offers meeting organizers the opportunity to apply for support of a lecture to be given by an EMBO Young Investigator.</p> <p>Please note that only current EMBO Young Investigators are eligible. A listing can be found on the <a href="#">EMBO website</a>.</p> <p>Maximum funding: €800 (within Europe) and €1,200 (outside Europe).</p> <p>Please complete the <a href="#">application form</a> and send to the EMBO Young Investigator office (<a href="mailto:yip@embo.org">yip@embo.org</a>).</p>
<b>EMBO Global Investigator Lectures</b>	<p>The EMBO Global Investigator Network offers meeting organizers the opportunity to apply for support of a lecture to be given by an EMBO Global Investigator.</p> <p>Please note that only current EMBO Global Investigators are eligible. A listing can be found on the <a href="#">EMBO website</a>.</p> <p>Maximum funding: €1,000 (for travel within the same country/region) and €2,000 (for intercontinental travel).</p> <p>Please complete the <a href="#">application form</a> and send to the EMBO Global Activities office (<a href="mailto:global@embo.org">global@embo.org</a>).</p>
<b>EMBO Science Policy Lectures</b>	<p>The EMBO Science Policy Programme offers meeting organizers the opportunity to include a non-scientific talk from a scientist, sociologist, ethicist, or journalist.</p>

	<p>The lecturer must hold a presentation on 'Science Policy' issues.</p> <p>Maximum funding: €1,000 (within Europe) and €2,000 (outside Europe &amp; Israel).</p> <p>Please complete the <a href="#">application form</a> and send to the EMBO Science Policy office (<a href="mailto:policy@embo.org">policy@embo.org</a>).</p>
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#### **EMBO Women in Science Lectures**

EMBO offers meeting organizers the opportunity to include a talk addressing issues related to women in science.

The lecturer must hold a presentation on 'Women in Science' issues.

Maximum funding: €1,000 (within Europe) and €2,000 (outside Europe & Israel).

Please complete the [application form](#) and send to the EMBO Women in Science ([women@embo.org](mailto:women@embo.org)).

## **9. Publicizing & co-funding**

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The workshop will be titled "EMBO Workshop". The (main) title of the workshop shall not mention other organizations or institutes that support the conference. Organizers should also refrain from using excessively long titles, or acronyms and numbers referring to previous meetings. If an application is successful, any meeting title that is not in line with the EMBO guidelines will be revised before publication on the website, poster or any other promotion materials.

The website, poster and all promotional materials should include the EMBO logo and the [EMBO Workshop stamp](#). The EMBO Press and corresponding EMBO Press journal logo shall be featured with other supporter logos on the website and poster.

Sponsors cannot be mentioned in the title of the meeting but can be acknowledged on the website and the poster. Sponsors who provide €20,000 or more towards the meeting can also be recognized as co-sponsors. The co-sponsors logos can be displayed prominently on the website.

EMBO does not consider funding workshops when the other co-funders/sponsors insist on the proceedings being published (although publications can arise from EMBO Workshops, provided that all contributions are given voluntarily).

All EMBO Workshops are announced on the EMBO poster, EMBO website and social media channels and through other select print and online media.

Further advertising is left at the organizer's discretion. It is a strict condition of EMBO funding that any additional publicity, as well as the programme and abstract book, should clearly indicate that the meeting is an EMBO Workshop, without subtitles relating to previous similar meetings or other organizations.

The scientific programme of your meeting, as submitted at the time of application, was reviewed, and approved by the EMBO Course Committee. Responsibility for subsequent changes to the programme, and the organization and execution of the meeting, lies exclusively with the meeting organizers.

EMBO hosts the meeting website but does not take responsibility for the content provided by the organizers. Organizers are responsible for ensuring that all content and images provided by them for the websites comply with German copyright laws. Fines resulting from copyright infringement will be the organizers' responsibility and will be deducted from the final payment of the awarded EMBO funding.

Organizers shall comply with all applicable laws and regulations, standards, and guidelines, including GDPR ([see also Data protection below](#)), in the advertising of an EMBO funded meeting.

Organizers shall also ensure that all processes and procedures used relating to the organization of the meeting comply with all local laws, regulations, standards, and guidelines that apply in the jurisdictions in which the meeting takes place.

## 10. Poster and website

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EMBO will create the workshop website (including an online registration system), design a poster and abstract book cover at no additional charge.

For information on various methods of collecting registration fees, please see [Registration Fee Collection](#). Please note that EMBO does not handle registration fee payments, but only provides information that may be useful to organizers.

Please note that EMBO does not print or mail the posters or abstract books designed for your workshop.

Full details will be supplied to organizers shortly after acceptance of the funding conditions has been confirmed.

# 11. Poster Prize and EMBO Press editor talks

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EMBO Press offers a limited number of poster prizes each year. If you would like to request a poster prize for the workshop, please contact [publishing@embo.org](mailto:publishing@embo.org).

EMBO core funding cannot be used to cover poster prizes.

If an EMBO Press editor is attending the workshop they can be contacted to arrange:

- a “meet the editor” session
- a talk on topics related to publishing and open science
- a panel discussion with ~3-5 panelists representing key stakeholders in publishing and related topics
- more informal sessions targeting trainees (e.g. offering a roundtable discussion or including the editors in one of the meet the speakers’ sessions)
- another format/activity of your choice

# 12. Code of conduct

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At EMBO, we believe that harassment and discriminatory behaviour are unacceptable in any setting. This code of conduct will be applicable for all participants of EMBO meetings and will be published on the website of your workshop.

Please find below a general code of conduct for your EMBO Workshop.

## **Anti-harassment and non-discrimination policy**

This EMBO meeting shall maintain an environment free of harassment and discriminatory behaviour for everyone, regardless of gender, gender identity and expression, age, sexual orientation, disability, physical appearance, ethnicity, beliefs (religious or otherwise) or manner of articulation.

Harassment and discrimination of attendees in any form, either in person or online is not tolerated.

Attendees are expected to conduct themselves in a professional manner and all communication and behavior should conform to a respectful environment for all.

#### **Media and communications policy (adapt as appropriate)**

Unpublished data may be presented at this meeting, and presenters may not want their results to be communicated beyond the audience in attendance at the meeting. Participants must seek approval from the presenter before quoting or passing on any of the data presented.

Furthermore, the recording or communication of the scientific content presented (e.g., talks, discussion sessions or posters) by audio, video, photographs or any other means, or communication via social media needs to be agreed upon by all concerned.

Attendees violating this Code of Conduct may be asked to leave the workshop, practical course, or lecture course without a refund at the sole discretion of the organizers.

Attendees are expected to respect the media and communications policy during this EMBO meeting.

## **13. Encouraging Sustainable Meetings**

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EMBO would like to promote lessening the environmental impact by encouraging EMBO Courses & Workshops organizers to implement, to the best of their abilities, some measures that should keep the CO<sub>2</sub> footprint of their meeting at a minimum.

We are aware that these measures may not seem significant on their own, but we do hope that they will raise awareness and will help to change many people's behaviours. Only together can we make a difference to the climate and the future of the planet. We would therefore welcome initiatives from organizers that encourage debate about this topic at the meeting.

**Reducing long-distance air-travel:** It is recommended to include at least one remote presentation at the meeting. This should not be given by an additional speaker but should replace a regular speaker in your programme. The money saved for travel and accommodation (max. €1,500) as a result can be used to cover additional travel grants for participants travelling to the venue by train from the available core budget. Please indicate this in your budget estimate. Please note that this is not a binding requirement for Practical Courses.

**Train travel:** Encourage speakers and participants to take trains within Europe for shorter distances, e.g., under 800km or under 6–8 hours of travel time. As above, organizers may use the money saved by introducing remote speakers to offer travel grants or subsidies to participants travelling by train (max €1,500 total).

**Provide catering with lower CO<sub>2</sub> impact:** Serve vegetarian food preferentially and reduce meat options from the meals. You might consider the following:

- a) On at least one day of the meeting only vegetarian food is served.
- b) Catering should be served in non-disposable wares.

c) If possible, try to avoid (plastic) bottled water and plastic cups.

**Electronic programme and abstract book:** Organizers should distribute the abstract book in electronic format via the workshop website and to print only a minimum number of hardcopies, if necessary. Via the EMBO provided meeting web site organizers can export the abstract book in electronic format. This can then be made available, password protected, on the workshop website.

**Voluntary CO<sub>2</sub> compensations:** Organizers may consider collecting voluntary CO<sub>2</sub> compensation payments from participants and donate to accredited compensation brokers.

**Central locations:** Consider venues that are centrally located and easily accessible by public transport.

**Plastic-free badges:** Organizers should consider using paper badges.

**EMBO promotional items:** EMBO provides notebooks (FSC certified paper), bags (from recycled materials), and pencils for meetings on request. Notebooks are perforated to encourage their continued use after the meeting. You will be contacted prior to the meeting to inform us of your needs.

## 14. Participant feedback

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Feedback from all participants is automatically collected after the meeting via the EMBO created and hosted website of your workshop. Participants who fill out the questionnaire automatically receive their certificate of attendance via email. Organizers will have access to the anonymised feedback forms.

Should you be using your own registration system, you will be required to provide EMBO with a complete list of participants, including speakers according to the template that EMBO will provide. They will be contacted by EMBO with the request to fill out the feedback questionnaire. Organizers will have access to the anonymised feedback forms.

The anonymised feedback will be ready to be shared by EMBO at least one month after the meeting's end date.

## 15. Data protection

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As the majority of EMBO Courses & Workshops take place in Europe or include speakers and attendees from Europe, you have agreed to comply with the European General Data Protection Regulation ([GDPR](#)). Under the GDPR, you hold the position of “data controller”, meaning that you are the decision-makers regarding the personal data that is collected and processed for the organization of your meeting. As a data controller, you must familiarize yourselves with the GDPR and your obligations to your data subjects. Specifically, you must agree only to collect personal information that is necessary for organizing your meeting and ensure that the people whose information is collected are aware of the ways in which it will be used. Any person whose personal information (including names, email addresses, institutional addresses etc.) is to be used in the promotion of the meeting must explicitly agree to their information being used in this way. You must also ensure that subjects are aware of their [rights under the GDPR](#), including the right to be made aware of the data you hold about them and to correct, erase or receive a copy of this data.

An appropriate disclaimer informing users of their rights under the GDPR will be included in all online registration systems supplied by EMBO. If you are not using the websites or registration platforms provided by EMBO, it is your responsibility to ensure that the participants are made aware of their rights.

If you are planning to contact meeting participants after your workshop, you must obtain their active consent during the meeting (e.g., through a sign-up list). Please be aware that under the GDPR, you have an obligation to document that they have given this consent, so please keep the corresponding documentation.

## 16. Final documentation

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Templates for the final documentation will be provided after the 1<sup>st</sup> instalment of the grant has been paid, approximately four months before the meeting. The following documents will be expected:

- A short report (1–2 pages) about the workshop, including a short scientific overview, participants' reaction to the location and organization, and any other relevant comments.
- Final financial statement, which should include all income and expenditure for the workshop. Please note that the organizer must retain receipts for ten years after the workshop for auditing purposes.
- If the meeting was hybrid, a separate hybrid component financial statement.
- Total number of applicants, and the number, gender, nationality, and country of residence of academia & industry participants, and of instructors and speakers and the mode of travel to the workshop (for in person participants) For hybrid meetings, please indicate whether participants attended virtually or in-person.
- Final programme and abstract book (preferably electronic).
- If applicable: List of travel grant, childcare grant, accessibility grant and registration fee waiver awardees (including name, institute, nationality (if known), country of residence and amount awarded for travel and childcare grants. Please note that the organizer must retain receipts for ten years after the workshop for auditing purposes.

**All of the above documents must be submitted to EMBO within three months following the end date of the workshop. Failure to do so will result in the final payment being forfeited.**

**In addition, failure to successfully submit all final documents within time will negatively impact eligibility for future meetings' funding from EMBO.**

## 17. Registration Fee Collection

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This brief overview is intended to provide information on the possible ways of setting up a payment system for your EMBO funded meeting.

You may want to get advice regarding tax implications of your meeting. These may arise for example from collecting registration fees, sponsorships etc. These implications may differ between the place from which you organize the meeting and where the meeting is taking place.

Please note:

- EMBO does not guarantee nor take responsibility for the services of any of these providers.
- EMBO does not offer to set up or provide support in the use of these services - questions about the platform and how to work with it should be directed to the support services of the respective providers.
- Some services charge a commission for the transaction of each payment. You should check the amount of the fee and consider whether to adjust your pricing accordingly.

Payment module via EMBO supplier	Online transactions (PayPal, Stripe, WorldPay etc.)	Bank transfer
Can be used with any bank account, including your university bank account.	Requires that you have a business bank account	Requires that you have a business bank account
Requires the use of a payment gateway.		
The registration system matches the payments to the participants for credit card payments.	Payments and participant registration details have to be manually matched.	Payments and participant registration have to be manually matched.
Both credit card payments and bank transfers are possible. Bank transfers need to be manually matched (with some exceptions).	Credit card payments are possible.	Credit card payments are NOT possible.

Included with the EMBO website, but not set up by EMBO.	PayPal and other online payment services generally charge a commission for each transaction.	There may be additional charges for international transfers.
<p>The cost for this payment module is €550 and can be covered by your grant.</p> <p>See below for a detailed description of the COMS module.</p> <p>For set up and support, please contact <a href="mailto:m.mandl@coms.app">m.mandl@coms.app</a></p>	<p>For support, please contact your service provider.</p> <p>For a brief tutorial on how to use PayPal for online payments, please see <a href="#">here</a>.</p>	For support, please contact your bank.

#### **IMPORTANT:**

Please note that your chosen payment provider may not be available in all countries and may not accept all credit cards, debit cards, or payment methods. EMBO cannot help with any problems relating to the platform you use.

Please also note that only the payment module via the EMBO supplier will allow for matching the payments with the registrants' data. For all other methods of accepting registration fees, you will need to manually match the payments with the registrants' data.

## **17.1. Overview of the COMS payment module**

### **In a nutshell**

1. If you opt to use the COMS payment module, you will be responsible for setting it up and managing the payments.
2. If you intend to collect credit card payments, you will need to activate a payment gateway (a platform that processes credit card payments and deposits them in your account), and then link this gateway to your bank account and also to the COMS system.

### **In detail**

1. The COMS payment module allows you to create forms for the collection of conference fees and other bookings from the users. Admins set up the forms and make them available to the users, in the same way as other forms (e.g. abstract submission form). When users fill in the form and then confirm their booking, an invoice is created and emailed to them. Admins have records of these bookings in the admin area and functions to manage them.
2. When setting up the payment module, admins can decide which payment methods they will allow. There are two methods, which can be activated independently of each other (i.e. one or the other, both, sometimes none, if the meeting is free):
  - 2.1. Bank transfers:** If you activate this method, users will see your bank details on the payment form and invoice. They will be able to use this information to transfer the billed amount. The payments will later show up on your bank statements, and you will be able to manually input the transactions into the COMS system, in the admin area. The record

for the user will then be updated to payment completed and a receipt will be sent out to the user. This is available without the need for any Stripe or PayPal account but requires manual work on your part.

Note: Automatic matching of bank transfers is possible in some cases if your bank account is located in specific European countries, and you are using Stripe to collect the payments.

**2.2. Credit card payments:** These need a payment gateway to process the cards (e.g. Stripe, PayPal, Girocheckout). The payment gateways process the funds and deposit them in your bank account. Our integration with these gateways prompts them to report the transactions to COMS in real time (server to server), which allows for an automatic update of the payment records in our database. As soon as the user has completed the credit card payment, the record is set to completed and a receipt is sent out. Admins see this in the admin area and save themselves the manual work necessary for bank transfers. A transaction fee is paid to Stripe or PayPal, but not to COMS.

In order to process credit card payments, you need a Stripe, PayPal (business account) or Girocheckout account. None of these work with individuals, only businesses since the processing of credit card payments is only legally authorized for registered businesses. Therefore, such accounts cannot be created in your private name but would have to be created in the name of your organization/ university/institute/non-profit (any legal entity) and will be checked by Stripe/PayPal against public records of their business registration.

Please note that, unless you already have a Stripe, PayPal (business) or Girocheckout account, their creation requires some work, and most importantly, assistance from your administration in providing the data relating to their business record. **The creation of such an account is not possible for all organizers, who often need permission from their institutional administration. For this reason, please first check with your administration office if this is a viable option for you.**