

### 3. Managing Your Expert Contracts

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#### Introduction

The online services to experts have been extended to ensure a convenient and secure platform for exchanges with the European Commission services. These services include providing your identity and bank account details (replacing previous paper forms), transmission of contracts, signing your contract electronically in the system using your ECAS credentials and finally, submitting your payment request online.

In order to confirm your identity, as part of the contracting process, the European Commission needs to receive a copy of your passport/identity card and bank account details.

To Manage your expert contracts you need to:

- Confirm your passport or ID and bank account details,
- and
- Electronically sign an expert contract.

*Download the whole section on Managing your Expert Contracts and Managing your Expert Payments as an Adobe PDF file.*



### 1. Confirming your Passport or ID Card and Bank Account Details

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#### Confirm your ID Card or Passport details

Once you have a valid profile and have been selected for an assignment, you will receive an email inviting you to confirm your passport or ID card and to enter your bank account details. This is a mandatory step needed to issue you with an expert contract.

## Europa / Research / Participant Portal notification

Dear Dr. PROCTER

You have registered as an expert in the Expert area in the Participant Portal and you have now been identified as a possible candidate for a future assignment in one of our EU and Euratom programmes.

We are pleased to announce that the online services to experts have been extended to ensure a convenient and secure platform for exchanges with the European Commission services. These services include providing your identity and bank account details (replacing previous paper forms), transmission of contracts, signing your contract electronically in the system using your ECAS credentials and finally, submitting your payment request online.

In order to confirm your identity, as part of the contracting process, the European Commission needs to receive a copy of your passport/identity card and bank account details.

To do so, please submit your passport/identity card and bank account details by clicking on the link below.

### What happens next?

We will inform you once your identity and bank account data have been successfully processed. Note that it is not possible to sign expert contracts before this process has been completed.

[Please click here to submit your passport/identity card and bank account.](#)

Please log-in with the email address to which this notification was sent. In case you have forgotten your password, you can retrieve it using the "Forgot Password" link provided on the login page.

The user manual ('user manual' button on bottom left) is a useful guide. Otherwise, should you have any questions, check the [FAQ](#) or [contact our help-desk](#).

Kind regards,  
The Participant Portal team

To confirm your passport or ID card details, proceed as follows:


1. Click the **Please click here to submit your passport / identity card and bank account** link in the email you have received.
2. Enter your ECAS username or email address, and password. Then click the **Login** button.
3. Go to **My Area | My Expert Area | Profile | Identity details..** It shows the personal details and contact information that you have submitted to the Commission.

**Note:** The information here must match exactly your passport or ID card. The information on this screen is editable, so that you can make any required changes.

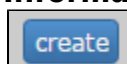
For example, if your name appears as "Patrick John Smith" on your passport or ID card but you have always been known as "John Smith", including in the Commission database, you should change your name in this screen to match your passport or ID card.

Similarly, your official address should be entered here, i.e. the private address registered with the authorities in your country of residence, and which in some cases, appears on your ID card.

4. Make any required changes to the existing personal details and contact information, so that it matches your passport or ID card.
5. Select the ID document type in the **Document Type** field, under **Passport/ID details**.
6. Enter the document number, the issuing country, your place of birth and your country of birth in the relevant fields.

Personal Details	Passport/ID details	Supporting Document
<b>First Name</b> <input type="text" value="Marta"/>	<b>Document Type</b> <input type="radio"/> PASSPORT <input checked="" type="radio"/> <b>ID</b>	<p><b>Eligible supporting documents</b> are either an <b>identity card</b> or <b>passport</b>.</p> <p>Click on an image to see full size.</p> <p>The image(s) below are only for previewing purpose</p>  <p><b>This is a.pdf</b> Size : 18.58 kB</p>
<b>Family Name</b> <input type="text" value="DE DECKER"/>	<b>Passport/Id number</b> <input type="text" value="098787988ZY7"/>	
<b>Date of Birth (dd-mm-yyyy)</b> <input type="text" value="27-07-1966"/>	<b>Document Issuing Country</b> <input type="text" value="PORTUGAL"/>	
<b>Place of birth</b> <input type="text" value="Leuven"/>	<b>National Id</b> <input type="text" value="09878798"/>	
<b>Country of birth</b> <input type="text" value="BELGIUM"/>	<b>Issuing National ID Country</b> <input type="text" value="PORTUGAL"/>	
<b>Phone number (+32123456789)</b> <input type="text" value="+3223023088"/>	<b>Fax (optional)</b> <input type="text"/>	<p>Upload a new document (PDF) - max 10MB (Up to three files with multiple pages)</p> <input type="text"/> <p><b>Browse</b></p> <p><input checked="" type="checkbox"/> <b>Confirm the document has not expired</b></p> <p><input checked="" type="checkbox"/> <b>Confirm that the scan is readable</b> (see <a href="#">examples</a>)</p> <p><input checked="" type="checkbox"/> <b>Confirm the number of document on the scan corresponds to that indicated in the passport/ID number</b></p>
<b>Official Address (Private address, not business address)</b>		
<b>Street name and number</b> <input type="text" value="de Spoelstraat 15"/>		
<b>Town/City</b> <input type="text" value="Machelen"/>	<b>Post code</b> <input type="text" value="1830"/>	<b>Country</b> <input type="text" value="BELGIUM"/>

- Make a scan of **both sides** of your ID card, or the relevant ID pages of your passport, and save it in PDF format. This is the only format accepted by the system.
- Click the **Browse** button to locate the PDF scan of your ID document. Then select the file and click the **Open** button. A thumbnail of the file appears under **Supporting Document** and the file name appears in the **Upload a new document** field.
- Click the three check boxes to confirm that you have verified that:
  - the document has not expired
  - the scan is readable
  - the document number on the scan matches the document number on the ID card or passport.
- If you **do not** require a VAT exemption certificate click the **No** option in **Business Information** section, then click the **Create** button at the bottom of the screen.




If you **do** require a VAT exemption certificate follow the procedure in the "Requesting a VAT Exemption Certificate" section, below.

## Requesting a VAT Exemption Certificate

The EU does not pay Value Added Tax (VAT) on invoices for expert payments, in accordance with the treaties.

You should request a VAT exemption certificate **ONLY** if you are VAT taxable under your national law for the services you provide to the EU as part of the expert contract. If you (rather than a limited company you own) are registered for VAT in one of the EU Member States, you may request a VAT exemption certificate by clicking the **Yes** option below and uploading the VAT registration document provided by the financial authorities in your country. The VAT number entered below must be registered in your name in your capacity as a natural person, and not in the name of another legal entity, for example, that of any limited company you own. Therefore, the name on your VAT registration form should be the same as the name provided in the Legal Entity information.

 **Note:** You can perform this operation when you are creating your Legal Entity file, or at a late date.

To request a VAT exemption certificate, proceed as follows:

1. Under **Request a VAT Exemption Certificate**, click the **Yes** option. The screen expands to display the following fields.

**Browse**

**Official Address**  
*(Private address, not business address)?*

Street name and number

Town/City Post code Country

**Confirm that the:**

- ☐ document has not expired
- ☐ scan is readable (see [examples](#))
- ☐ number of document on the scan corresponds to that indicated in the passport/ID number
- ☐ document of registration for VAT has been uploaded

**Request a VAT Exemption Certificate**

You should request a VAT exemption certificate **ONLY** if you are VAT liable under your national law for the services you provide to the EU as part of the expert contract.

You may request a VAT exemption certificate if you are registered for VAT in your own name in your capacity as a natural person in one of the EU Member States.

The name on your VAT registration form should be the same as the name provided in the Legal Entity information.

☐ No, I do not require a VAT exemption.

☒ **Yes, I will complete the required fields and upload the VAT registration document provided by the financial authorities in my home country.**

VAT number

Registration Country Registration City

Business Name (optional) Registration number

**create**

2. Complete the required fields.
3. Make a scan of the VAT registration document provided by the financial authorities in your country, and save it in PDF format. This is the only format accepted by the system.
4. Click the **Browse** button to locate the PDF scan of your VAT registration document. Then select the file and click the **Open** button. A thumbnail of the file appears under **Supporting Document** and the file name appears in the **Upload a new document** field.
5. Click the additional check box to confirm that you have uploaded your VAT registration document.
6. Click the **Create** button (If this is the first time you have registered your ID/requested a

VAT Exemption Certificate) or the **Submit** button (If you are updating existing information).

The **Congratulations, you have successfully registered your data** screen appears.

7. Click one of the two links provided to:

**Go back to the European commission Participant Portal**

Or

**Provide us with your Bank account details.** (You need to have a bank statement or the 'financial identification form' signed, stamped and dated by your bank).

## Confirm your Bank Account details

### Register Now


To register a Bank Account **now**, proceed as follows:

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 **Note:** To register a bank account **at a later time**, see the procedure **Register Later**, below.

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1. On the **Congratulations, you have successfully registered your data** page, click the **Provide us with your Bank Account details** link. The **Bank Account** page appears.
2. Choose either **I want to use my personal bank account** or **I want to use a third party bank account**, depending on your preference.
3. Enter the name, street, town, post code and country of the bank, in the relevant fields.
4. Enter a valid IBAN number in the **IBAN** field or a valid non-IBAN format bank account number in the **Other (non-IBAN format)** field.
5. Click the **Browse** button to locate the PDF scan of your bank statement or the 'financial identification form', signed and stamped by your bank. Then select the file and click the **Open** button. A thumbnail of the file appears under **Supporting Document** and the file name appears in the **Upload a new document** field.
6. Click the checkbox to confirm that you have verified that the scan is readable.

Account Details	Bank Details	Supporting Document
<input checked="" type="radio"/> <b>I want to use my personal Bank account</b> <input type="radio"/> I want to use a third party Bank account Account holder's name <input type="text" value="Yvonne DE DECKER"/> <div> <i>The account holder name and address must correspond exactly to what appears on your bank statement or form signed by your bank.</i> </div> Street name and Number <input type="text" value="de Spoelstraat 15"/> Town/City Post code (optional) <input type="text" value="Machelen"/> <input type="text" value="1830"/> Country <input type="text" value="BELGIUM"/>	Bank name <input type="text" value="Banca Popolare di Sandria"/> Branch street name and number <input type="text" value="via Mazzini 1"/> Town/City Post code (optional) <input type="text" value="Broni"/> <input type="text" value="27043"/> Country <input type="text" value="ITALY"/> IBAN <input type="text" value="IT31K0580000080000025007"/> BIC code <input type="text" value="POSOIT22"/> Other (non-IBAN format) <input type="text" value="Not available for this country"/> Branch/RTN/BSB/ABA <input type="text" value="Not available for this country"/> Remarks (optional) <input type="text" value="Write here any remarks you want to provide for account"/>	<div> <i>Eligible supporting documents are either:</i>  <b>A. A recent bank statement (bank certificate, RIB, online banking screenshots ...)</b>  <b>containing the following mandatory information:</b>            1. name of the bank            2. name of the account holder            3. <b>complete account number/IBAN</b>            4. <b>Routing code, BSB or ABA number</b> if used            5. <b>recent date</b> (less than 6 months)            Amounts and movements mentioned on the bank statement may for privacy reasons be hidden.  <b>Important:</b> a copy of a bank card or empty cheque is not acceptable.  <b>B. A financial identification form</b> stamped, dated and signed by a bank representative.         </div> <div>           Click on an image to see full size.            The image(s) below are only for previewing purpose    <input checked="" type="checkbox"/> This is a.pdf            Size : 18.58 kB            Upload a new document (PDF) - max 10MB (Up to three files with multiple pages)  <input type="text"/>  <input type="button" value="Browse"/>  <input checked="" type="checkbox"/> Confirm the scan is readable         </div> <div> <input type="button" value="Delete account"/> <input type="button" value="update"/> </div>

7. Click the **Create** button (if this is the first time you have registered this bank account) or the **Update** button (if you are updating existing information). The **Congratulations** screen appears.

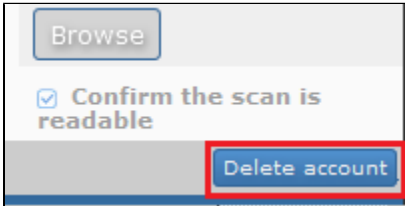
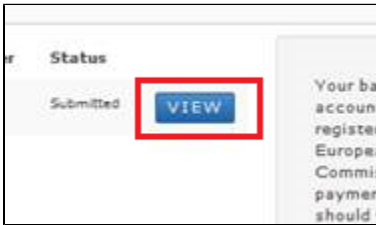
## CONGRATULATIONS, YOU HAVE SUCCESSFULLY CREATED YOUR BANK ACCOUNT IN OUR SYSTEM.

You could choose to perform one of the recommended actions :

- Go back to the European commission Participant Portal by [clicking here](#)
- Create another Bank account by [clicking here](#)

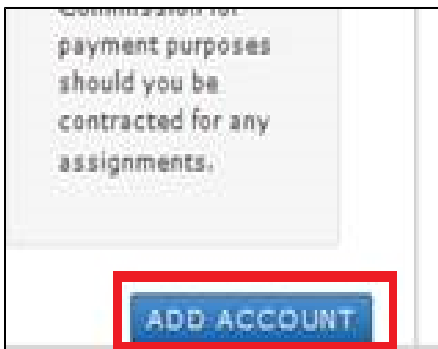
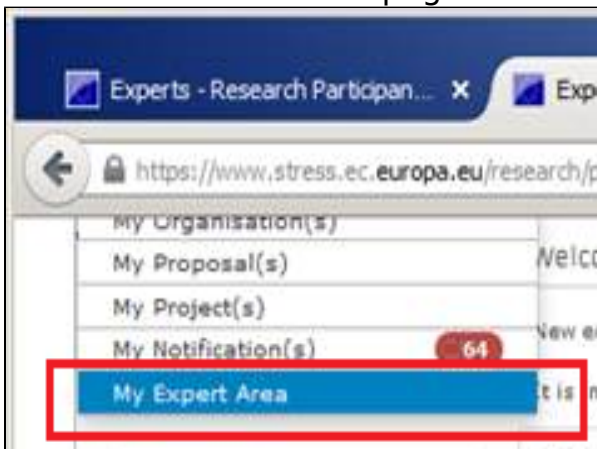
8. To register an additional bank account, click the **Create another bank account** link then repeat steps 2 to 7.

**Note:** The application supports up to five bank accounts per expert. To remove an existing bank account, go to **My Area|My Expert Area|Profile** page, click the **VIEW** button in the **Bank Accounts** section, and then press the **Delete account** button on the BA page.



## Register Later

1. Go to the **My Area|My Expert Area** in the Participant Portal and click the **Add Account** button at the end of the page.



2. Follow steps 2-7 of the procedure **Register Now**, shown above.